



## FortiCompanion to Technical Support

Consistent service and the reliability of your security infrastructure are critical to the business success of your organization. To address these requirements the FortiCare service portfolio provides a comprehensive set of programs including global coverage for technical support services and security threat management.

The FortiCompanion handbooks aim to provide you with the information to understand and make best use of the Services available to you as a valued Customer; this guide is focused on our Technical Support Services. For a more detailed description you may also refer to the FortiCare Terms & Conditions available via the Support Portal.

## Global Technical Support Teams

Technical Support is delivered via our Global Technical Assistance Centers. Each geographical region has a Centre of Expertise, supplemented by regional support center's providing for regional and local language support.

The entry point via telephone is through our Customer Services team who provide call center services and intelligent routing of incoming service requests. The Global Technical Assistance Centers deliver technical support to their regional customers as well as providing follow-the-sun assistance to ensure 365x24x7 global support coverage.

Americas	Centre of Expertise: Vancouver Regional Support Centers: Dallas, Mexico City, Miami, Ottawa, New York
Asia Pacific	Centre of Expertise: Kuala Lumpur Regional Support Centers: Beijing, Singapore, Sydney, Tokyo
Europe, Middle-East & Africa	Centre of Expertise: Sophia Antipolis Regional Support Centers: Bangalore, Dubai, Frankfurt, Prague, Reading

### Contacting Technical Support

- Telephone access to support is via global toll-free numbers:  
[http://www.fortinet.com/support/contact\\_support.html](http://www.fortinet.com/support/contact_support.html)
- Webchat provides a mechanism to obtain quick answers to technical questions or requests for information. This is available via the Support Portal:  
<https://support.fortinet.com/Ticket/WebChatViewProducts.aspx>
- The Support Portal provides a range of options including viewing Customer Support Bulletins, accessing Asset Management and Lifecycle Management information as well as the capability to create. The Support Portal is available at <https://support.fortinet.com> and for FortiPartners via <https://partners.fortinet.com>

### Overview of Support Teams

Technical Support is organized by expertise thus allowing each group to focus on providing the right solution at the right time. The First Level Engineering Team respond to queries on product functionality and features. The Second Level Engineering Team supplemented by a group of Product Escalation Engineers focus on debugging and resolving complex tickets. For customers who require a more personalized level of service the Premium TAM Service is available where a Technical Account Manager delivers technical support services.

To facilitate resolution of incidents each regional team is equipped with a state-of-the art FortiLab, containing a full range of Fortinet appliances, third party equipment, as well as industry standard traffic generators. The FortiLab utilizes a network layout and management interface developed in-house by Fortinet Support engineers based on their requirements and needs. As a result complex setups are made easy, configurations and software versions can be modified at a click, which allows our support engineers to spend more time analyzing data and responding to customers.

## Technical Information Sources

FortiCare services entitle you to a wealth of information in a range of formats to assist in the deployment and maintenance of your Fortinet products. The following technical sites all have RSS feeds available to allow you to keep up-to-date with the evolving security landscape.

URL	Resource
<a href="http://kb.fortinet.com">http://kb.fortinet.com</a> <b>Knowledge Base</b>	For searching and obtaining detailed information, the Knowledge Base is an ideal resource. It is the central repository for technical notes and tips the majority of which are created by the Technical Support Teams.
<a href="https://forum.fortinet.com">https://forum.fortinet.com</a> <b>Discussion Forums</b>	The technical discussion forums are a mechanism for posing questions as well as for sharing technical information with Fortinet users around the globe.
<a href="http://docs.fortinet.com">http://docs.fortinet.com</a> <b>Documentation</b>	This site provides access to Fortinet product documentation which includes; admin guides, reference manuals, release notes, hardware manuals, quick start guides.
<a href="http://cookbook.fortinet.com">http://cookbook.fortinet.com</a> <b>Documentation</b>	The Cookbooks focused on typical deployment challenges to ensure a smooth installation.
<a href="http://video.fortinet.com">http://video.fortinet.com</a> <b>Video Guides</b>	These tailored videos provide a free learn-as-you-go type capability to enable you to become proficient with Fortinet technology.
<a href="http://www.fortiguard.com">http://www.fortiguard.com</a> <b>FortiGuard Center</b>	The FortiGuard Security Portal provides summaries of the latest internet threats, security advisories across popular vendor technologies and access to the latest Hot Bulletins. You can also find details of specific malware through the encyclopedia, a database of over 4M records. Finally you can access the signature database for specific security services such as anti-virus, intrusions and web filtering.

Software Download Center: <https://support.fortinet.com/Download/FirmwareImages.aspx>

The Download Center provides access to firmware images for Fortinet products including feature and patch releases.

There are three types of FortiOS releases available:

- Major Release: 5.0.x  
Contains major changes to functionality and are generally available every three years.
- Minor Release: 5.2.x  
Contains minor changes to functionality and are generally available every twelve months.
- Patch Release: 5.2.1  
Contains bug fixes to customer reported problems and are generally available on a rolling 4-8 week window (depending on the specific product).

The decision to upgrade firmware requires analysis and planning. New firmware can bring valuable new features or include important bug fixes that will add value to the services delivered. This needs to be weighed against the criticality of the IT services being supported and secured.

To assist you through the process Fortinet provides detail on new features, bug fixes and upgrade instructions in the Release Notes associated with all new versions and patches. It is key that you consult this documentation an integral part of your change control program.

Access to firmware images is available via the Support Portal:

<https://support.fortinet.com/Download/FirmwareImages.aspx>

## Technical Support Tickets

At some point in the life of your Fortinet appliance you may need to raise a technical support ticket. To create a ticket either contact Customer Service by telephone or create a ticket via the Support Portal. If you have a Priority 1 or Priority 2 issue you must use the telephone to raise the incident.

### Ticket Priority Definitions

Priority	Definition & Customer/Fortinet Responsibilities
Priority 1	<p>Any technical ticket created for an incident that causes a total loss or continuous instability of mission critical functionality in a live or production network environment. Examples are;</p> <ul style="list-style-type: none"> <li>• Catastrophic impact to mission critical functionality.</li> <li>• An outage impacting multiple active user sessions and/or critical traffic.</li> <li>• A major loss of connectivity.</li> <li>• A vital security flaw impacting active business services.</li> </ul> <p>The Customer and Fortinet both commit to dedicate technical resources 24 hours a day, 7 days a week, 365 days a year by telephone and remote sessions.</p> <p>If a workaround is accepted a Priority 1 ticket will be reclassified in priority with the agreement of both parties. Workarounds include:</p> <ul style="list-style-type: none"> <li>• Reverting configuration changes</li> <li>• A firmware upgrade or downgrade</li> <li>• Replacement of the hardware</li> <li>• A change to the configuration</li> </ul>
Priority 2	<p>A technical ticket created for an issue that causes significant impact to mission critical functionality in a live or production network environment. Examples are;</p> <ul style="list-style-type: none"> <li>• Serious loss or frequent instabilities of mission critical functionality impacting active user sessions</li> <li>• Loss of redundancy of a critical component impacting live business services</li> </ul> <p>The Customer and Fortinet commit to dedicate technical resources 8 hours a day, 7 days a week for Priority 2 Tickets. If a workaround is accepted by the Customer, a Priority 2 ticket will be re-classified in priority</p>
Priority 3	<p>Any technical ticket created for an issue in the Customer network that has minimal impact to business operations. An example is occasional or intermittent instabilities of core functions.</p> <p>A Priority 3 ticket may also cover the root cause analysis for a Priority 1 or Priority 2 ticket for which a workaround has been accepted.</p> <p>Fortinet and the Customer will assign resources 8x5 during business days until a resolution or workaround has been provided.</p>
Priority 4	<p>Any technical ticket created for additional information, including, basic configuration assistance, errors in documentation or minor defects which do not impact business services.</p> <p>Fortinet and the Customer will assign resources 8x5 during business days until a resolution or workaround has been provided.</p>

### FortiCare Service Contracts

FortiCare Technical Support Service contracts include access to the Support Portal, the ability to contact the Fortinet TAC for customer service assistance as well as resolution of technical tickets, access to software updates (maintenance and feature releases) and the replacement of hardware determined by Fortinet to be defective. There are Service levels available which allow different levels of access to Technical support namely FortiCare 8x5 (during Business Hours) and FortiCare 24x7 (available 365x24x7).

## Ticket Creation via the Support Portal

When you create a technical support ticket you will be requested to provide a specific set of data aimed at facilitating ticket resolution. To troubleshoot complex incidents our support teams need to fully understand the network topology and role of the Fortinet device(s) in it. Providing device configuration and all available log files provides a good starting point for the investigation of your issue and therefore should be attached to all new support tickets. Please refer to the following Knowledge Base article for examples of information to provide per product family:

<http://kb.fortinet.com/kb/documentLink.do?externalID=FD30000>

## Ticket Handling SLAs

The FortiCare Service contracts include Service Level Agreements that are aimed at ensuring communication for a timely initial response as well as transparency during the ticket resolution process.

- The Initial Response Time is the length of time before a qualified TAC representative contacts the customer.
- The Reporting Interval is the length of time between updates by the Ticket Owner when a Fortinet action is pending.

Priority	Initial Response	Frequency of Updates
Priority 1	Less than 1 hour	Every 6 Hours
Priority 2	Less than 1 hour	Daily
Priority 3	Next Business Day	Every 3 B. Days
Priority 4	Next 2 Business Days	Weekly

## Ticket Progress

Once a ticket has been created you will receive a Ticket Number and the incident will be assigned to a Support Engineer in accordance with the ticket priority. You can expect to receive an Initial Response either by telephone or email. Each time you receive an up-date this will be logged within the Support Portal.

As Technical Support is structured in levels, based upon the nature and complexity of the incident the ticket may be escalated internally, in which case this will be clearly indicated.

The Technical Support Engineer will focus on providing a resolution as well as a workaround to reduce the business impact. During the ticket resolution process the Technical Support Engineer may;

- Suggest configuration changes
- Request access to the appliance for troubleshooting purposes
- Replicate the scenario in the lab
- Log a bug when the root cause has clearly been identified as a software defect

If a ticket solution has been isolated to a defect, the Technical Support Engineer will open a Bug Report with the Engineering Group. A Bug ID will be assigned and reported back to you in the ticket. Once the defect is resolved it will typically be incorporated into the next patch release.

The ticket resolution process requires constant communication and collaboration. To facilitate closure there is an automated mechanism to prompt for updates. The system will send weekly reminder emails when an action is pending by the Customer. This process will continue for a period of fifteen days, after which, the ticket will move to the status "Pending Close Confirmation" at which time a final email requesting feedback will be sent.

If no response is received for a further five days the ticket will be automatically closed. If feedback is not possible within the notification period, you may contact the TAC engineer to inform them when you are able to provide an update.



## Ticket Status Definitions

Each time a change is made to the status of a ticket you will be automatically notified. The ticket status definitions can be viewed on the Support Portal as outlined below.

Status	Definition
Registered	A new ticket has been opened and is pending assignment. The action is with Fortinet
Researching	The engineer is researching the technical data and will contact you to discuss their findings. The action is with Fortinet.
PendCustFB	The TAC has requested additional information to continue their analysis and is awaiting feedback. The action is with the Customer.
RcvdCustFB	This is set automatically whenever you update the ticket. The action is with Fortinet.
On Hold	You have agreed with the TAC to temporarily suspend the ticket resolution process. A ticket will typically be placed On Hold when a Customer needs to plan for the capture of additional information or perform other actions in a production environment. On Hold tickets have a commitment for a follow-up date.
PendCloseConf	If a ticket has been in the status PendCustFB for more than fifteen days then it is automatically changed to PendCloseConf. If no response is received to this status change within five days the ticket will be automatically closed.
PendBugFix	A bug fix request has been submitted to Engineering and a bug number (bug id) communicated.
WaitGARelease	A bug fix has been created by Engineering and is awaiting incorporation into the next GA release
Resolved-PendGA	A 'hot-fix' has been provided; the ticket will remain open until this change has been incorporated into the next GA release.
Solution Provided	A solution has been provided and we are awaiting your confirmation to close the ticket.
Closed	The problem is resolved and the ticket has been closed, a closed ticket cannot be re-opened.

## Ticket Escalations and Priority Changes

In certain circumstances, the conditions surrounding an incident may change. This may include a re-occurrence of the problem, an aggravating business impact or the need for immediate focus on ticket analysis and resolution from both Fortinet Support and yourselves. To allow for this dynamically changing environment Fortinet Support incorporates the processes of ticket priority increase and ticket escalation that allow for a reassessment of how a ticket is being managed.

### Increasing Ticket Priority

One method of gaining additional focus on a ticket is to increase the priority and therefore change the associated SLAs. Depending on the ticket priority this can be achieved either through the Support Portal or by a telephone call to Fortinet support.

P4 => P3	Either telephone or update the ticket in the Support Portal indicating the new business impact
P3 => P2	You must telephone the TAC for all P1 and P2 tickets including creation and all requests for raising the Priority
P2 => P1	

### Fortinet Automated Notification Process

Fortinet implements an automated escalation process to notify and alert the Management team as time progresses. These notifications allow both Regional Management and Global Leadership teams to be made aware of issues as they arise as well as ensuring executive sponsorship to drive action plans and resolution.

The escalation process within Fortinet is based on engaging the appropriate level of management, up to the Executive Level to allow momentum of resolution through access to the appropriate resources.

The Priority 1 times are measured in hours, 24 hours per day x 7 days per week. The remaining priorities correspond with business hours. It should be noted that in circumstances where customer technical resources are not available for longer than 1 hour the TAC reserves the right to downgrade a P1 to a P2.

Priority 1	TAC Manager: Immediately VP support: 6 hours VP Sales: 12 hours Fortinet CEO: 24 hours
Priority 2	TAC Manager: Immediately VP Support: 1 Business Day VP sales: 2 Business Days Fortinet CEO: 1 Week
Priority 3	TAC manager: 1 Week Regional Sales Director: 1 Month
Priority 4	TAC manager: 1 Week Regional Sales Director: 1 Month

### Escalating to TAC Management

Before considering an escalation, you should ensure that you have all the pre-requisite items in place to support your request and to enable rapid ticket resolution. Typical questions to consider are:

- Have you verified that all relevant information has been provided in the ticket and communicated to Fortinet Support?
- Have you clearly documented in the ticket the increased business impact or extended deadlines caused by the incident?
- Have you informed your management of the situation and assured their availability to engage if necessary?
- Have you designated the appropriate level and availability of technical resources within your organization that are available to work with technical support? This is key as your assistance will be required immediately for P1 incidents.

Once the escalation conditions have been met and checklist items validated, you should telephone the Technical Support Centre ensuring you have the relevant ticket number to hand. The Customer Service representative will connect you with the on-call Duty Manager.

A ticket escalation will ensure that you receive our support management's attention. It should be noted that requesting an escalation will ensure a focus of your ticket, but may preclude an accelerated resolution time depending on the complexity of the issue, nor does it imply that the priority of the ticket will be automatically increased.

As required, a technical plan of action will be co-developed to ensure resolution of the technical issue. The assigned Manager will update yourself and any other internal stakeholders including your account team and upper management of your ticket progression. The escalation will have been resolved when the following conditions have been met:

- Agreed objectives have been accomplished
- A monitoring phase has passed without incident
- A workaround has been implemented and a final solution has been accepted
- It is agreed that the ticket has been resolved

## Tracking Customer Satisfaction

To measure customer satisfaction and assure continuous improvement, a survey is sent for every ticket which provides the customer with the ability to rate the service. The evaluation uses the Net Promoter® concept which is a simple approach to measuring customer loyalty. It is used by leading companies worldwide and is considered the standard for improving customer satisfaction and using customer feedback to fuel improvements.

The Net Promoter Score uses as a basis the concept that every customer can be divided into three categories;

- Promoters are loyal enthusiasts who will refer others to Fortinet. These customers will rate their experience with a score of 9-10.
- Passives or Neutrals are satisfied with the service but are not enthusiastic customers and therefore vulnerable to competitive offerings. These customers will rate their experience with a score of 7-8.
- Detractors are unhappy customers who can generate negative word-of-mouth. These customers will rate their experience with a score of 0-6.

### Ticket Closure Survey

The questions posed in the survey will request you to rate the following elements: the Quality of Solution Provided, the Technical Competence of engineer, if the handling was Timely and your Overall Satisfaction. This last question is used to create the overall NPS score for the Technical Support teams. For each survey to ensure follow up of Promoters and Detractors, there is also an option for the customer to;

- Complete a free format text with their direct feedback
- Request a telephone call from a technical support manager

### Survey Analysis

The survey reports are compiled on a weekly and quarterly basis and distributed to technical support management to track performance. The weekly report additionally contains the specific free format text feedback as well as the list of customers requesting a personal contact.

All tickets where a text feedback has been completed are verified by technical support management and actions documented. All customers who request a phone call are contacted directly by a representative of technical support.



## Tracking Hardware & Software Lifecycle

To ensure we provide innovative solutions to Customers products are periodically discontinued. When this occurs for hardware products a public communication including a transition plan is made available. The appliance then enters the end of life phase, during which, it is possible to purchase up to sixty months of technical support services.

For firmware the lifecycle is thirty-six months from the release date of the minor or major software.

All information regarding end of life announcements is stored in the Support Portal together with the Hardware and Software Lifecycle Policy. It is recommended that all Customers ensure they are familiar with the process.

<https://support.fortinet.com/Information/ProductLifeCycle.aspx>

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